

RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**

Certification: In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:

Private Sponsor(s):

The Third Way Foundation (PPI is a pr

Travel Dates:

March 16 - March 18, 2023

Name of accompanying family member (if any):**Relationship to Traveler:****Total Expenses**

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$518	\$450	\$132	

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

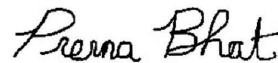
Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

5/18/23

Date

Prerna Bhat

Printed Name of Traveler



Signature of Traveler

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

5/18/23

Date



Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☒ Yes ☐ No

Expense Change	Revised Amount	Explanation
+\$83 Transportation	\$518	Bus & taxi/uber adjustment + different flight back
+\$15 Meals	\$132	Lunch price adjustment

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation:

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

Explanation:



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Washington, DC 20005
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info@ppionline.org

February 13, 2023

Perna Bhat
Office of U.S. Senator Elizabeth Warren
Washington, DC 20515

Dear Perna,

On behalf of the Progressive Policy Institute (PPI), I'd like to invite you to join us for a bipartisan trip to Austin, Texas, with other congressional staffers who cover environmental and energy policy issues. The trip is departing on the evening of Thursday, March 16, and returns on the morning of Saturday, March 18.

For years, PPI has assembled delegations of congressional members and staff for high-level, educational trips to explore how the issues moving on Capitol Hill have an impact on the real world. This specific trip will focus on the cutting edge innovation happening in Austin on electronics recycling and broader clean energy strategies.

During this brief trip, we will pack a full program of informative tours and meetings with experts in state and local government, private industry, and academia. Highlights of the trip will include meetings with public sector officials working on energy and recycling policies, top scholars advancing global energy transition research and supporting the development of new energy infrastructure, and those in the private sector implementing innovative recycling technologies to enable a more circular economy.

PPI is a non-profit 501 (c) (3) organization with the mission of providing educational programming on current policy issues. This bipartisan congressional staff delegation trip will comply with all House and Senate ethics rules.

I hope that you will be able to join us for what promises to be an insightful and educational visit to Austin. **We kindly ask that you RSVP no later than Friday, February 10th, 2023.** Space is limited; please contact Stuart Malec at 202-525-3926 or smalec@ppionline.org if you have questions or require further information.

Regards,

Lindsay M. Lewis
Executive Director

Trip Name: PPI Congressional Staff Delegation Trip to Austin, TX

Organization Information

Organization Name:

The Third Way Foundation (Progressive)

Is your organization classified as a §501(c)(3)?

☒ Yes

☐ No

If Yes, §501(c)(3) Organization Type:



Private Foundation



Public Charity

Address:

1156 15th Street NW

City, State, Zip:

Washington, DC 20005

Phone Number:

202-525-3926

Organization URL:

progressivepolicy.org

History of Congressional Travel

Describe your organization's history of sponsoring congressional travel.

The Progressive Policy Institute (PPI) has sponsored several Congressional staff and member delegations since its founding in 1989. These educational trips have focused on a wide variety of policy areas and they aim to explore how the issues moving on Capitol Hill have an impact on the real world.

Educational Activities

Describe the educational activities performed by your organization other than sponsoring congressional travel.

As of non-profit 501 (c) (3) think-tank, the nature of PPI's work is educational. We release dozens of reports, research, and other policy analysis work annually. PPI also hosts public forums, Congressional staff and member briefings, webinars, roundtables, and other events around issue education.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status (Select one):



I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyist.



I certify that the sponsor is not a federally registered lobbyist but does retain or employ one or more federally registered lobbyists.

Foreign Agent Registration Status (Select one):



I certify that the sponsor is not an agent of a foreign principal and does not retain or employ an agent of a foreign principal.



I certify that the sponsor is not an agent of a foreign principal but does retain or employ one or more agents of a foreign principal.

Foreign Government Involvement

Foreign Agent Registration Status (Must select all):



I certify that the sponsor is not a foreign government.



I certify that the sponsor is not an entity that is owned or operated by a foreign government.



I certify that the sponsor does not receive funding from a foreign government.

Purpose and Details

Provide a brief description of the trip.

This trip is a bipartisan, bicameral congressional staff delegation trip to Austin, TX. It will focus on the cutting edge innovation happening in Austin on the issues of electronics recycling, e-waste, and broader clean energy strategies. It will include informative tours and meetings with experts in state and local government, private industry, and academia around these issues.

Explain how the purpose of the trip relates to your organization's mission.

The trip directly related to PPI's mission to providing educational programming on important issue areas. The bipartisan nature of the trip also reflects PPI's commitment to the development of pragmatic policy that can help break through partisan gridlock.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

If No, describe your organization's role in planning the trip.

If there are multiple sponsors, each sponsor must submit Organization Information (Page 1 of the Private Sponsor Travel Certification Form) and a Signature Page Form.

Grantmaking Organizations (Optional)

If you have a Grantmaking Organization, you must attach a Grantmaking Organization Certification Form.

- 1.
- 2.
- 3.

With or Without Regard to Congressional Participation (Select one):

- ☐ The trip is arranged or organized without regard to congressional participation.
- ☒ The trip is arranged or organized with regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing (Must select all):

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations (Select one):

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Complete if any of the sponsors is not a §501(c)(3) organizations (Select one):

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
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Certification of No Recreational Activity and No Alcohol (Must select all):

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Will members and staff from the House of Representatives receive invitations?

- ☒ Yes ☐ No

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:
March 16, 2023



Trip End Date/Time:
March 18, 2023

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes ☒ No

Transportation (Member/Officer/Employee: \$⁴³⁵ Accompanying Family Member: \$^{N/A})

Transportation Type	Class	Amount
Airfare	Coach	\$345
Bus	-	\$50
Ride share/taxi	-	\$40
Details (optional)		

Lodging (Member/Officer/Employee: \$⁴⁵⁰ Accompanying Family Member: \$)

Check-In	Check-Out	Facility	City	State	Country
3/16/23	3/18/23	Courtyard by Marriott Austin	Austin	TX	
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		
2	\$225	Yes	Hotel prices are elevated due to the annual South by Southwest conference.		
Check-In	Check-Out	Facility	City	State	Country
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		
Check-In	Check-Out	Facility	City	State	Country
Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.		

Meals (Member/Officer/Employee: \$¹¹⁷ Accompanying Family Member: \$)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
3/16/23			\$30	\$4	\$34	Austin	TX	Travis	N
3/17/23	\$15	\$15	\$30	\$4	\$64	Austin	TX	Travis	N
3/18/23	\$15			\$4	\$19	Austin	TX	Travis	N

If costs exceed the federal per diem, please explain why expenses over the per diem rate are reasonable and necessary.

Reasonable Miscellaneous Expenses

(Member/Officer/Employee: \$ Accompanying Family Member: \$)

Expense Type	Amount	Notes

Additional Details (optional)

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: PPI Congressional Staff Delegation Trip to Austin, TX
Travel Date(s): March 16 - March 18, 2023
Travel Destination(s): Austin, TX
Sponsor: The Third Way Foundation (Progressive Policy Institute is a

Lindsay Lewis
(printed name of sponsor representative)

Executive Director
(title)


(signature of sponsor representative)

2/10/23
(date)



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PPI Congressional Staff Delegation Trip to Austin, TX
Thursday, March 16, 2023 – Saturday, March 18, 2023

TRAVEL DAY

Thursday, March 16

- 5:25 PM** **Flight to Austin, TX**
Southwest Flight #2336 DCA-AUS, arrives 8:15 PM local time
(non-stop)
- 8:45 - 9:15 PM* *Travel to hotel - Taxi/rideshare*
- 9:15 PM** **Check-in to hotel**
Courtyard by Marriott, 300 E 4th St, Austin, TX 78701

AUSTIN:

Friday, March 17

- 7:30 - 8:15 AM** **Breakfast in hotel, receive PPI briefing materials**
- 8:15 - 9:00 AM* *Travel to Material Recovery Lab - Bus*
- 9:00 - 11:00 AM** **Presentation and tour of Material Recovery Lab**
30.431646, -97.755947 (North Austin)
- Staff will receive a presentation on e-waste and technology recycling innovation from industry representatives at the Material Recovery Lab in North Austin. Following the presentation, a guided tour will be provided which will include a “meeting” with Daisy, a state-of-the-art recycling robot that disassembles and recycles parts from discarded smartphones.
- 11:15 - 12:00 PM* *Travel to Texas State Capitol – Bus*
- 12:00 – 1:45 PM** **Luncheon with bipartisan legislature staff from Texas Caucus on Climate, Environment and Energy**
1100 Congress Ave., Austin, TX 78701
- Congressional staff will have the opportunity to meet with their state legislature counterparts to discuss pending legislation and other initiatives concerning energy and environmental issues in Texas.



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1:45 - 2:00 PM *Travel to University of Texas Austin – Taxi/rideshare*

2:00 – 4:00 PM **Energy briefings at University of Texas Austin**
2304 Whitis Ave, Austin, Texas 78712

Congressional staff will receive multiple briefings from leading academics at UT Austin. Staff will visit the UT Austin Energy Emissions Modeling and Data Lab to discuss research on developing new transparent models and datasets for accurate greenhouse gas emissions across global supply chains. Staff will also visit the UT Austin Energy Institute for a briefing on global energy transition research and research on costs and impacts associated with investment in the United State's aging energy infrastructure.

4:00 - 4:15 PM *Travel to Austin City Hall – Taxi/rideshare*

4:15 - 5:15 PM **Meeting with City of Austin officials to discuss Austin Climate Equity Plan**
301 W 2nd St, Austin, TX 78701

Congressional staff will meet city officials who will provide an overview of the Austin Climate Equity Plan. The plan takes into account the disproportionate burden climate change places on low-income communities and communities of color, and outlines a goal of equitably reaching net-zero community-wide greenhouse gas emissions by 2040, with a strong emphasis on cutting emissions by 2030.

5:15 – 6:15 PM *Programming break*

6:15 – 6:30 PM *Travel to dinner – Taxi/rideshare*

6:30 – 8:30 PM **Dinner discussion on public opinion polling with Texas Politics Project**
Irene's
506 West Ave, Austin, TX 78701

Congressional staff will meet with representatives from the Texas Politics Project over dinner to discuss their recent non-partisan, statewide polling on energy, climate, and storm response issues conducted in conjunction with the Texas Tribune.



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TRAVEL DAY

Saturday, March 18, 2023

10:00 - 10:45 AM Travel to airport - Taxi/rideshare

12:30 PM Flight to Washington, DC
Southwest Flight #286 AUS-DCA, arrives at 6:10 PM local time (1 stop)

Invitees:

Annie D'Amato
Professional Staff Member
Senate EPW Committee
annie_d'amato@epw.senate.gov

Jake Kennedy
Professional Staff Member
Senate EPW Committee
jake_kennedy@epw.senate.gov

Lizzie Hunsaker
Energy and Climate Policy Advisor
Sen. Chris Coons
Elizabeth_Hunsaker@coons.senate.gov

Mary-Eileen Manning
Policy Advisor
Sen. Dan Sullivan
mary-eileen_manning@sullivan.senate.gov

Julia Poirier
Policy Advisor, Science and Technology
Rep. Haley Stevens
julia.poirier@mail.house.gov

Alan McQuinn
Professional Staff Member
House Committee on Science, Space, and Technology
alan.mcquinn@mail.house.gov

Leighton Huch
Policy Director
New Democrat Coalition
leighton.huch@mail.house.gov

Tom Erb
Climate Policy Director
Rep. Scott Peters
tom.erb@mail.house.gov

Koray Rosati
Legislative Aide
Rep. Jake Auchincloss
koray.rosati@mail.house.gov

The U.S. Senate House of Representatives staff members listed above have been invited because of their subject matter expertise on the topics of environmental protection, renewable energy, emissions regulations, e-waste and electronics recycling, science and technology, and other issues that will be covered in the program of this staff delegation trip.

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved.

Name of Traveler:

Prerna Bhat

Employing Office/Committee:

Office of Senator Elizabeth Warren

Private Sponsor(s):

The Progressive Policy Institute (PPI) has sponsored several Congressional staff and

Destination(s):

As of non-profit 501 (c) (3) think-tank, the nature of PPI's work is educational. We

Travel Dates:

03/16/2023-03/18/2023

NOTE: If you plan to extend the trip for any reason you **must** notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties.

This trip is a bipartisan, bicameral Congressional staff delegation trip to Austin, TX focused on clean energy strategies. As a legislative aide working on climate and environmental policy, this delegation trip will help me better understand the cutting edge innovation happening in Austin, and how local and state governments, academia, and private industry can work with the federal government to advance clean energy priorities.

Do you have an accompanying family member or spouse on this trip? **Name and Relationship to Traveler:**

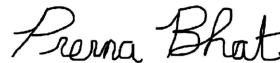
☐

(signify "yes" by checking box)

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

2/14/23

Date



Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Senator Elizabeth Warren

Prerna Bhat

I _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☒

(signify "yes" by checking box)

2/14/23

Date



Signature of Supervising Senator/Officer